

# **Plan and Reporting Integration**

**Date of Proposal: November 2003**

**Date formed: TBD**

## **Objectives of the working group:**

- Review and modify the M&V Plan outline, the Post-Installation Report outline, and the Annual Report outline to ensure consistency, coordination, and uniformity between outlines and in consideration of outlines under development.

**Expected Date of Completion: may 2004**

## **Final Deliverable(s):**

- Revised outlines for use across the federal sector
- Develop example M&V Plan, and then consider development of Post-Installation Report, and Annual Report examples

## **Additional notes for the working group:**

- Investigate agency requirements from annual DOE reporting and consider incorporating into outlines
- Obtain update from the Cx working group for any modifications required to outlines
- Obtain any updates from the proposed O&M verification working group and incorporate any requirements into the outlines

## **Discussion Documents for the working group:**

**Current Status:** proposed

**Committee Chairperson: Lia Webster**

## **Initial Members of the working group:**

- Ron Araujo (Select Energy)
- Bonnie Piast (JCI)
- Dave Ward (NREL)
- Mike Cross (AF)
- Pat Mumme (AF)

## **Strategies for Including Advanced Metering in ESPCs**

### **Objectives –**

Establish guidance for using Advanced metering in ESPC as an ECM/ECP or an M&V tool including baseline establishment and M&V approaches. Coordinate activities with FEMP Advanced Metering Task Force

### **Deliverables**

- #1: List of possible strategies
- #2: Development of selected strategies (as directed by Board)

### **Timeline**

- Develop list of clarified goals coordinated with Ab's group - start of second quarter (FY04)
- Deliverable #1: April 2004
- Deliverable #2: July 2004

Working Group expected life - 6 months

Note: Working Group received most votes of all WG options

### **Initial Members:**

- PNNL– Dave Hunt (chairperson?)
- Mark Stetz
- Steve Dunnivant
- Tim Kehrli
- Dave Ward
- Doug Dahle
- Terry Sharp
- Phil Voss
- Satish Kumar

## Uncertainty and Sampling Working Group

### Objectives

- Provide guidance on selecting appropriate levels of uncertainty.

### Deliverables

- Report on method(s) for estimating uncertainty
- Develop measure-specific recommendations or examples
- Develop option-specific recommendations or examples with emphasis on A.
- Report on existing tools
- Recommend potential tools to be developed

### Schedule

- Formulate approach to estimating project-level uncertainty - to be presented at next PF/MV meeting.

### Members

Mark Stetz (chair)	Nexant	mstetz@nexant.com 970-385-4932
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Satish Kumar	LBNL	skumar@lbl.gov 202-646-7953
Paul Mathew	LBNL	pamathew@lbl.gov 202-646-7952

## **Annual O&M Reporting Requirements WG**

### **Objective**

Develop recommended procedures for documentation and reporting of post-installation Government and ESCO Operations, Maintenance, Repair & Replacement Activities.

### **Deliverables**

1. Annual/Periodic O&M Activity Reporting Template, including
  - Summary Report
  - Detailed Checklist of Requirements
  - Documentation of actual work performed

### **Timeline**

Present Draft O&M Activity Reporting Template at Spring 2004 M&V Summit

### **Members**

- Jerry Culber (or other Noresco rep.)
- Sam Farouz (Semptra)
- Darryl Matsui (Navy)
- Mike Cross (Air Force)
- Will Litner (DOE)

## **M&V in High Tech Buildings (and other Special Applications) Working Group**

### **Objectives:**

- To identify specific ESPC M&V guidance for High Technology Building Applications that are not currently covered by the IDIQ Contract or the FEMP M&V Guidelines.

### **Deliverables:**

- Review of High Technology Building Awards, interview PFs, ESCOs, and Customers to identify lessons learned.
- Provide recommendations for Delivery Order requirements for these buildings (or processes) for a more effective project.

### **Time frame:**

- Completion by 4th Quarter 2004

### **Potential Team Members (NYC 2003)**

Will Lintner  
Dale Sartor  
Phil Voss  
Darryl Matsui  
Steve Dunnivant